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[] and 200,000 metric tons, which could result in nearly 200 metric tons of cocaine hydrochloride available for export. []

Peru: The Preeminent Producer

Peru has emerged during the last decade as a leading producer of coca leaf. We believe it has more land in coca cultivation than all the other South American countries combined, with at least 100,00 hectares planted to coca in 1985. In our judgment, Peru produces most of the coca leaf harvested in South America. The Departments of Cusco and Huanuco account for most of the leaf production, although some coca is grown in nearly every administrative area. [] only 43,000 hectares is approved for licit production. []

For the past several years, the official US Government estimate of the area devoted to coca cultivation in Peru was about 50,000 hectares, but [] the cultivated area is much larger. In 1981 [] 140,000 hectares devoted to coca countrywide, and recent []

[] claims as much as 89,000 hectares in the Cusco growing region alone. The US Embassy estimates cultivation at 100,000 hectares in 1985. Thus far we have been unable to do an imagery-based estimate of Peru's coca hectarage, and until we can do so the differences of opinion are likely to persist. [] We judge that processing inefficiencies probably limit the amount of cocaine hydrochloride produced from this large area to less than 100 metric tons a year. []

Bolivia: Number Two

We estimate Bolivia's 1985 crop at about 32,000 metric tons of dry leaf harvested from some 34,000 hectares. Our estimate of cultivated area is derived from [] high-altitude aircraft imagery. [] believe the coca grown in Bolivia could produce over 80 tons of cocaine hydrochloride. Most of the coca cultivation is located in the Yungas and Chapare regions on the eastern slopes of the Andes. Most of the coca in the Yungas is grown around Chulumani in terraced fields on steep mountain slopes. [] The soil is marginal for other agricultural crops but []

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adequate for the hardy coca plant. Extensive new fields have appeared along the road from Chulumani to Coroico and Coropati, where neatly terraced fields containing freshly planted seedlings were observed by US Embassy travelers in October 1985. [redacted]

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Most coca production in the Chapare region is located east of the town of Cochabamba, where cultivation began only in the last 25 years with the settlement of new agricultural lands. Much of the Chapare's agricultural land is devoted to food crops, but increased income from coca has led to a dramatic expansion of illicit coca cultivation in the region. Almost all coca in Bolivia is grown in the open with few attempts to hide the fields. [redacted]

revealed several other coca-growing areas in Bolivia, including the Yapacani, Apolo, and several other regions [redacted]

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Colombia: A Poor Third in Cultivation

Colombian growers cultivated some 16,000 hectares of coca in 1985, [redacted]

[redacted] This area would provide enough leaf to produce about 25 tons of cocaine hydrochloride. Although Colombian trafficking groups control much of the cocaine trade, they rely on growers in Peru and Bolivia to supply most of the coca paste and base for conversion to cocaine. Coca cultivation in Colombia has increased steadily over the past several years. Most fields are in the Llanos and Caqueta area, remote lowland regions in southeast Colombia that are part of the Amazon River Basin. [redacted]

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We believe the inferior quality of Colombian-grown coca plus the government crackdown on drug trafficking that began in 1984 probably have curbed the expansion of coca cultivation recently. Coca fields once considered safe from government interference are now vulnerable to manual eradication operations by the special narcotics police. In the expectation that Colombian Government efforts against the cocaine

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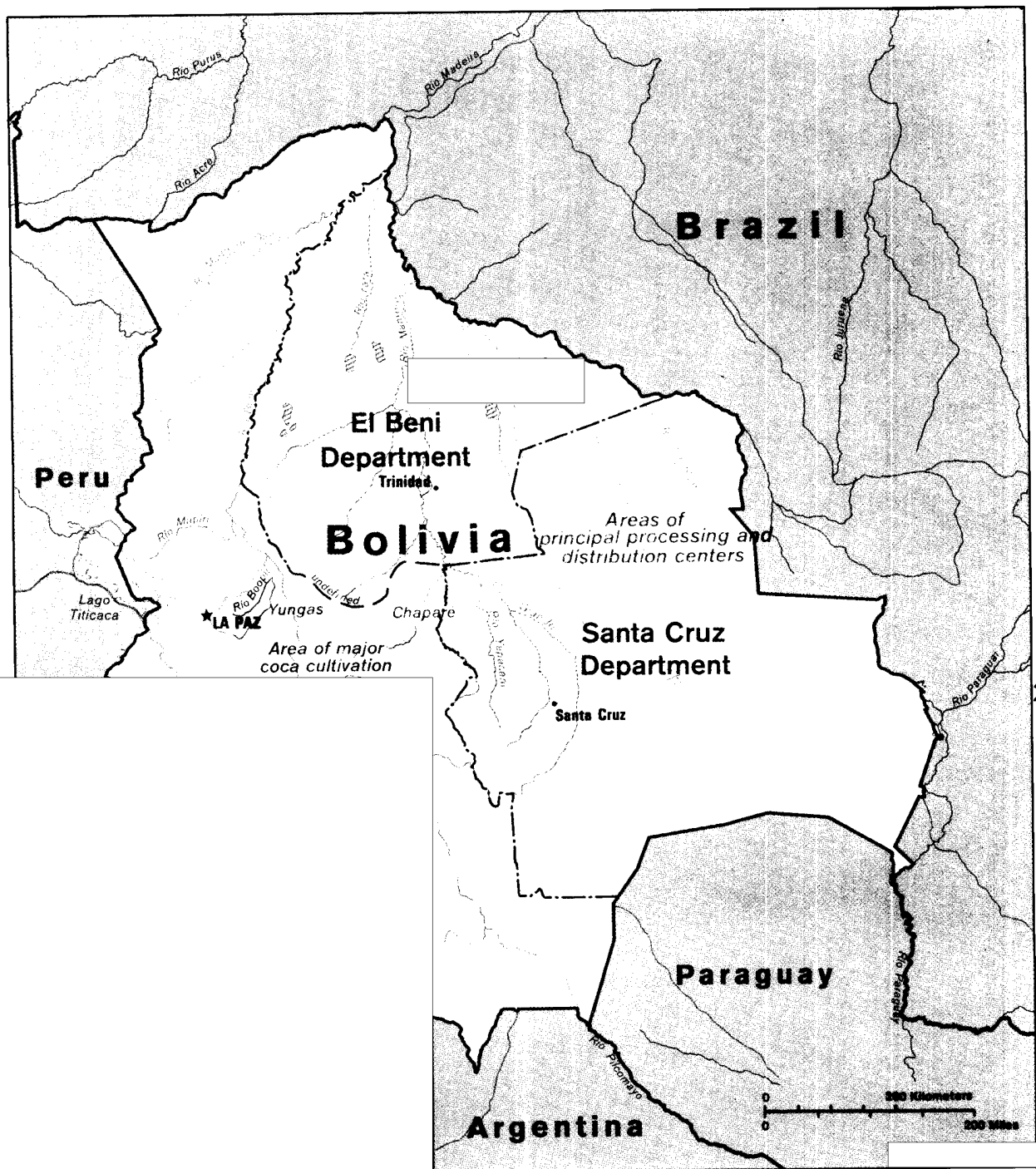
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